

## Get help managing your plan's financial accounting

**DAISI can oversee your NDIS Plan budget and process invoices for the services you receive.**

We troubleshoot any issues that arise with suppliers and the NDIS about claims for payment of services so you don't have to, and can focus on achieving your personal goals.

We provide monthly statements and ensure you have all the information you need for peace of mind.

## How we work with you

You can contact DAISI initially by phone, drop-in or referral. A DAISI Plan Management Coordinator will then contact you by phone, email or both to discuss your needs, and to schedule a time to meet.

This first meeting runs for about 45 minutes to 1 hour and the Plan Management Coordinator will explain their role, discuss the Service Agreement and make sure we are the right provider for you.

If you decide you want us to work for you and sign our Service Agreement, we will get you set up in the NDIS system and start processing your Plan's financial accounts.

**Have you received your NDIS Plan?**

**Did you request and receive Plan management in your plan?**

**Are you unsure of where to start?**

**Are you looking for a Plan Manager?**

**Come and talk to our friendly team, we will happily answer your questions.**

**Positive and encouraging feedback from newly appointed clients include:**

**"Thank you, you have made the process so clear."**

**"A huge weight has been lifted from my shoulders."**

## What we will do

The key tasks undertaken by the DAISI Plan Management Coordinator, are to:

- Obtain permission from the participant, or their nominee, to access their plan on the NDIS portal
- Set up Plan management bookings in the NDIS portal
- Set up standard service bookings in the NDIS portal
- File all service agreements you provide that have been made with your chosen service providers and set up payment of invoices within the NDIS financial system for the services to be delivered
- Ensure you have all the information you need
- Oversee the budget to ensure you have enough funds to pay invoices
- Process service providers' invoices on your behalf for services rendered
- Pay providers within 14 days from receipt of their invoices
- Check with you regarding any service provider invoicing issues
- Send you monthly statements